

WEEKLY PERFORMANCE SUMMARY

WEEKLY INTEGRATED NIELSEN - W/E 4/9/94

The following report is based on the new Integrated Nielsen weekly panel.

ALL OUTLETS COMBINED:

- PM's weekly share advanced +0.3 points versus week-ago to 45.9%, primarily reflecting continued growth of Marlboro. On a four week basis, Company performance was up +0.1 points to 45.8%, its highest level to date.
- Marlboro advanced +0.3 points versus week-ago to 27.7%, with positive performances in C-stores, Supermarkets and Mass Merchandisers and stable Drug store levels. On a four week basis, Marlboro grew +0.2 points to 27.5%.
- PM's Other Premium Brands declined -0.1 points versus week-ago, while PM's Discount products advanced +0.1 points, reflecting a week-to-week gain by Basic and stable PL performance.
- RJR incurred a -0.3 point week-to-week decline to 29.2%, driven by losses to Doral, Winston and its Private Label entries. During the latest four weeks, Reynolds' share declined -0.2 points versus four weeks ago to 29.4%, with the loss concentrated among its Premium brands, particularly Winston.
- The Discount category remained stable this week following the "first week of the month" advance last week. On a four week basis, the category was up +0.05 points to 32.5%, with Private Label growth (including RJR and Liggett PL's) offset by Branded Discount declines.

CONVENIENCE STORES (800 STORES):

- PM's share increased +0.4 points versus week-ago and +0.5 points during the latest two weeks to 48.0%, with gains by Marlboro and Basic driving company performance. On a four week basis, PM's share was unchanged versus four weeks ago at 47.7%.
- Marlboro's weekly share was 30.7%, up +0.2 points versus week ago, while the percent of stores with an incentive offer continued to decline (down -7 points during the latest four weeks to 6%).
- Basic's share increased +0.2 points versus week ago to 5.1%, however on a four week basis the franchise's share trailed four weeks ago by -0.2 points.
- RJR's share declined -0.4 points versus week-ago to 28.4%. Weekly advances by Camel, Monarch and Best Value (+0.1 points each) were more than offset by declines to Doral (-0.2), RJR's Private Label franchises (-0.2) and Winston parent packings (-0.1). On a four week basis, RJR's performance was relatively stable versus the prior four week period.

Camel's performance is likely benefiting from an increased incidence of free product deals, up +5 points week-to-week and +13 points since the w/e March 12 to 28%, its highest level since July 1993.

- Following last week's "first week of the month effect" advance, the Discount Category's weekly share declined -0.2 points versus week ago to 33.2%. On a four week basis, the category's performance was stable versus four weeks ago with Private Label gains offset by Branded Discount declines (-0.5).

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BENCHMARKS

NIELSEN DATA W/E 4/9/94

ALL OUTLETS COMBINED:

- All benchmarks are favorable with the exception of Basic's Share of Discount.

BENCHMARKS - TOTAL US WEEKLY INTEGRATED NIELSEN

	<u>Target</u>	<u>Benchmarks*</u>	<u>4 w/e 9-Apr</u>	<u>Current vs. Benchmark</u>
Phillip Morris	44.2	44.5 (lower limit)	45.8	1.3 Favorable
Marlboro	25.7	26.3 (lower limit)	27.5	1.2 Favorable
OPB	8.8	8.9 (lower limit)	9.1	0.2 Favorable
Virginia Slims	2.7	2.7 (lower limit)	2.9	0.2 Favorable
Benson & Hedges	2.5	2.5 (lower limit)	2.6	0.1 Favorable
Merit	2.8	2.8 (lower limit)	2.9	0.1 Favorable
Parliament	0.6	0.6 (lower limit)	0.6	0.0 Favorable
Basic Shr. of Disc. (SOC)	15.1	14.5 (lower limit)	14.3	0.2 Unfavorable
Discount Category	34.5	+2.0 Pts. (upper limit)**	32.5	2.0 Favorable
Private Label	8.5	9.0 (upper limit)	7.9	1.1 Favorable

* Revised to reflect 1994 First Revised Forecast.

** Annualized category growth (upper limit) is +2.0 points. First 6 months of 1994 total Discount category cannot exceed 34.5%.

CONVENIENCE STORES:

- All benchmarks are favorable with the exception of Basic's Share of Discount, Lowest Discount Price and Absolute Price Gap.

BENCHMARKS - TOTAL US NIELSEN WEEKLY C-STORE AUDITS (800 STORES)

	<u>Benchmarks</u>	<u>4 Weeks Ending 9-Apr</u>	<u>Current vs. Benchmark</u>
Phillip Morris	45.2 (lower limit)	47.7	2.5 Favorable
Marlboro	28.2 (lower limit)	30.5	2.3 Favorable
OPB	7.7 (lower limit)	8.0	0.3 Favorable
Virginia Slims	2.3 (lower limit)	2.3	0.0 Favorable
Benson & Hedges	2.2 (lower limit)	2.4	0.2 Favorable
Merit	2.6 (lower limit)	2.7	0.1 Favorable
Parliament	0.4 (lower limit)	0.5	0.1 Favorable
Basic - Shr. of Discount	16.3 (lower limit)	15.1	1.2 Unfavorable
Discount Category	+2.0 Pts. (upper limit)*	33.2	1.7 Favorable
Private Label	10.2 (upper limit)	9.6	0.6 Favorable
Lowest Disc. Price **	\$1.34 (lower limit)	\$1.33	\$0.01 Unfavorable
Absolute Price Gap ***	\$0.57 (upper limit)	\$0.58	\$0.01 Unfavorable

* Annualized category growth (upper limit) is +2.0 points. First 6 months of 1994 total Discount category cannot exceed 34.9%.

** Source: Nielsen Weekly Pricing Audits (linear average)

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